

DELEGATION MASTERY

FOR X VIRTUAL ASSISTANTS



X VIRTUAL
ASSISTANTS

WHY LOOM AI FOR SOPS

What Is Loom?

A simple screen-recording tool that captures your desktop (and optional camera) plus your voice—no editing software required.

Why Loom + AI Workflows?

- Visual Clarity: Show every click, menu, and field in real time.
- Automatic Time-Stamping: Your narration syncs to exact moments, so SOP steps align perfectly.
- One-Click SOP Drafts: Loom's AI turns your recording into a structured, bullet-point document in seconds.

Benefits for Non-Tech Users

- No Complex Software: Record using only Loom's browser or desktop app.
- Instant SOP Creation: Hit "Create SOP"—the AI handles formatting and structure.
- Consistent Quality: Every process follows the same clean format, ensuring your XVA never misses a step.



DELEGATION WORKFLOW

Easy Delegation Workflow

1. **Record:**

- a. Capture your routine task in under 5 minutes.

2. **Generate:**

- a. Click “Create SOP”—Loom AI drafts your document in seconds.

3. **Customize:**

- a. Add your logo, screenshots, and tips (no heavy lifting).

4. **Delegate:**

- a. Share the SOP link—your XVA is ready to learn and execute.

ACCOUNT SETUP

1. **SIGN UP AT LOOM.COM**

A. USE YOUR BUSINESS EMAIL

2. **UPGRADE TO LOOM BUSINESS + AI**

A. (AI SOP WORKFLOWS) UNDER SETTINGS → SUBSCRIPTION

3. **IN YOUR CLOUD DRIVE (GOOGLE DRIVE/DROPBOX)**

A. CREATE A FOLDER CALLED "SOPS"

4. **INSIDE IT, ADD SUBFOLDERS:**

A. 01_ADMIN, 02_MARKETING, 03_PERSONAL, 04_TECHNICAL



TASK SELECTION

1. **AUDIT YOUR WEEKLY TASKS & NOTE HOURS SPENT**
2. **HIGHLIGHT TASKS > 2 HRS/WEEK**
3. **START SELECTING TIME-CONSUMING TASKS TO DELEGATE**
4. **TITLE YOUR SOP VIDEO: "SOP - [TASK NAME] - [DATE]"**



RECORD WITH LOOM

1. **OPEN LOOM** → NEW → SCREEN + CAM (OR SCREEN ONLY)
2. **CONFIGURE** MIC, SCREEN/WINDOW, OPTIONAL CAM
3. **CLICK START RECORDING**, NARRATE EVERY CLICK CLEARLY
4. **CLICK STOP**; NAME VIDEO PER YOUR SOP TITLE



GENERATE AI SOP

1. **IN LOOM DASHBOARD** OPEN YOUR VIDEO
2. **CLICK THE AI ICON** → CREATE SOP
3. **COPY OR DOWNLOAD** THE GENERATED DRAFT



CUSTOMIZE & FINALIZE

1. **PASTE DRAFT** INTO A NEW GOOGLE DOC (OR ONEDRIVE/DROPBOX)
2. **INSERT YOUR LOGO** & APPLY BRAND FONTS/COLORS
3. **REPLACE GENERIC TERMS** WITH SPECIFICS (E.G., "SELECT CALENDAR TAB")
4. **ADD SCREENSHOTS OR CALLOUT TIPS** AS NEEDED
5. **SAVE AS TASKNAME - SOP - V1.0**



ORGANIZE IN CLOUD

1. **MOVE THE FINALIZED SOP INTO THE CORRECT SOP SUBFOLDER**
2. **SHARE SOPS FOLDER WITH PERMISSIONS:**
 - A. **EDITOR** → SELECT WHO HAS ACCESS TO EDIT THE SOP
 - B. **VIEWER** → SELECT WHO HAS ACCESS TO VIEW THE SOP



SHARE WITH XVA

1. **COPY** THE SOPS ROOT FOLDER LINK
2. **EMAIL** YOUR SUCCESS MANAGER:
 - A. **SUBJECT:** "SOPS – READY FOR AI COPILOT"
 - B. **BODY:** GREETING, FOLDER LINK, SOP LIST, PRIORITY TASK

SHARE



MAINTAIN & SCALE

1. **MONTHLY:** 15-MIN SOP CHECK-IN WITH YOUR TEAM
2. **QUARTERLY:** AUDIT SOPS → ARCHIVE OLD, ADD NEW
3. **DOCUMENT EVERY NEW PROCESS WITH THIS CHECKLIST**
4. **QUARTERLY:** 30-MIN TEAM WALKTHROUGH OF UPDATED SOPS





BREAK THE CYCLE

LEVERAGE YOUR TIME WITH

XVIRTUAL
ASSISTANTS